

## Topic Six – Effective Next Steps Planning



### Coaching, Evaluating and Delivering Constructive Feedback – Learning Series

We are pleased to bring you ***“Effective Next Steps Planning,”*** the 6th in a series of communications that discuss the value that coaching brings to your management practice and team leadership. The content presented will address the formal performance management process, and your role – as a Manager or Supervisor– in helping your employees get the most from the experience.

To reference previous topics, please click on the Coaching Series Home link located in the Quick Links section of this web page.

Thanks for all you do.

#### Overview: Effective Next Steps Planning

After having a coaching conversation, it's important that you put in place plans that support both you and your employee in following through on the next steps discussed. Effective next steps should close the loop on issues raised during your conversation with all parties involved and support your ability to think beyond the immediate situation to proactively work towards established goals.

When possible, you should plan next steps before leaving the coaching conversation. Use the last five (5) to ten (10) minutes of each coaching conversation (depending on the length of your meeting) to discuss how your employee can move towards achieving an immediate or long-term goal and how you can support his or her attainment of goals.

A key coaching tool is to summarize next steps and action items in an email or a written note if the employee doesn't have email access. You can take the task or assign it to your employee. Either way that note provides a record of the conversations and next steps that you can use to keep your coaching on track.

Also consider when it is appropriate to consult with HR or Labor Relations, for example, when giving a remedial plan in EPRS or issuing a written warning.

Taking the time to make coaching actionable and progress measurable will serve to enhance your employee's performance and strengthen your coaching relationship.

#### Benefits of Effective Next Steps Planning

The benefits of the EARN Feedback Process for Positive & Negative Situations are outlined below:

- Makes performance management an ongoing year-round process rather than a once-a-year event
- Creates an environment where performance management is proactive rather than reactive
- Adds value to the performance management process for your employees

- Assists in breaking down goals for your employees
- Reduces the stress around change, challenge, and growth
- Shows employer good faith in assisting employee development
- Prepares first step towards progressive discipline in developmental feedback situations

## Keys to Effective Next Steps Planning

Consider the following tips for effective next steps planning:

**Check in early and often:** Next steps must always include adequate follow-up to confirm that goals are being met and that all parties are executing on the steps to which they agreed. The frequency of your check-ins will depend on the complexity of the tasks being undertaken, when they can be achieved, and the amount of additional coaching that may be required to achieve objectives. Be careful to balance the need to monitor and check in with the need to avoid micromanaging. Also, increase check-in frequency for at-risk employees, e.g., those who have been experiencing consistent disappointments or frustrations.

**Encourage positive behaviors:** Your next steps should focus on proactively improving performance (or reinforcing existing positives), rather than on identifying further developmental feedback.

**Align next steps with goals:** Every step in your plan should take your employee one step closer to meeting his or her goals – whether it's a personal development goal, coaching someone through a challenging situation, or having them contribute to a large-scale project.

**Identify both short- and long-term goals:** Determine what needs to be addressed immediately (e.g., in the next one (1) to three (3) months, depending on the goal), what your ultimate or long-term goals (e.g., to be accomplished in the next four (4) to twelve (12) months, depending on the goal) are, and how to build from one to the other. Your small initial steps should enable greater gains down the road, and your next steps should account for both.

**Identify evaluation measures:** Whatever your goals may be, your next steps should account for the ways in which you will determine whether you are achieving those goals. "Evaluation measure" does not necessarily imply a "grade" or "score," but you should still define objective criteria by which coach and employee will know that progress is being made.

**Identify all relevant players:** Your employee probably isn't the only one with whom you need to follow up. Are there other team members with whom you might need to check in? Are there issues you need to report upward to your Manager? Are you in a situation where Human Resources should be involved?

**Be realistic:** Change does not happen overnight. Develop a plan that accounts for slow improvement over time and for the check-ins necessary to track that progress over an extended period.

**Be logical:** Following up on the completion of a particular work paper should be based on the timeline for that work paper's completion. If a conversation depends on further research, plan for that research to be done before the conversation. Account for interdependencies between any related next steps.

**Empower those who will be implementing next steps:** Different people will require different levels of follow-up, task definition, and coaching.

**Next Steps:** Make a specific request to change or continue the identified action or behavior – or ask for ideas on how to move forward. Not all employees will be willing or able in all instances to suggest next steps, but it is valuable to show your employees that you see him or her as part of the solution. You can also communicate that value by agreeing on next steps before you leave the coaching conversation.

Overall feedback should be:

- **Focused** – specifically on "what" and "how"

- **Frequent** – timely (e.g., occurring a day or two after the behavior is observed) and regular
- **Appropriate Environment** – employee should feel safe and open
- **Given with Attention** – share your feelings and perspective
- **Actionable** – behavior one can change or sustain
- **Balanced** – motivational and developmental

## Next Steps

**Activities:** To support your understanding and implementation of next steps planning, please use the attached timeline and tracker to manage your coaching conversations:

- [Next Steps Planning Timeline Tracker](#)

**Coming Next: Active Listening** is a communication technique in which the listener restates what he or she has heard as a way of confirming what was heard and that the speaker and the listener are in agreement and is the next topic in this series. It will provide you with the necessary skills to apply active listening to your coaching conversations.